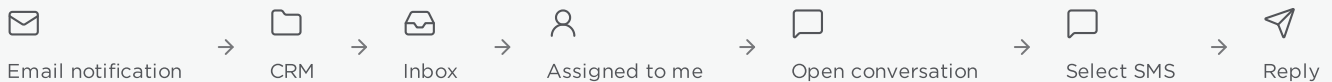




Responding to SMS Messages in HubSpot

When a contact replies to an SMS, our workflow assigns the conversation to the salesperson responsible for that contact and sends an email notification. Open HubSpot to read the conversation and respond.

⚡ YOUR QUICK REFERENCE



The email is your alert. Send your text response from the SMS conversation in HubSpot.

01 Watch for your email notification

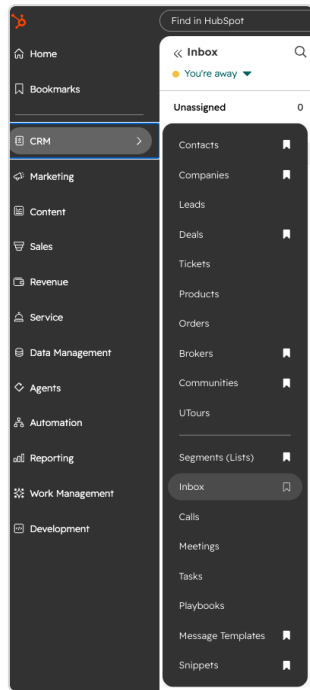
When one of your contacts replies by SMS, you will receive an internal email notification.

1. Review the notification to identify the contact.
2. Open **HubSpot** and make sure you are in the **eQ Homes account**.
3. Follow the steps below to locate the conversation.

02 Open the HubSpot Inbox

1. In the left navigation, click **CRM**.
2. Select **Inbox**.

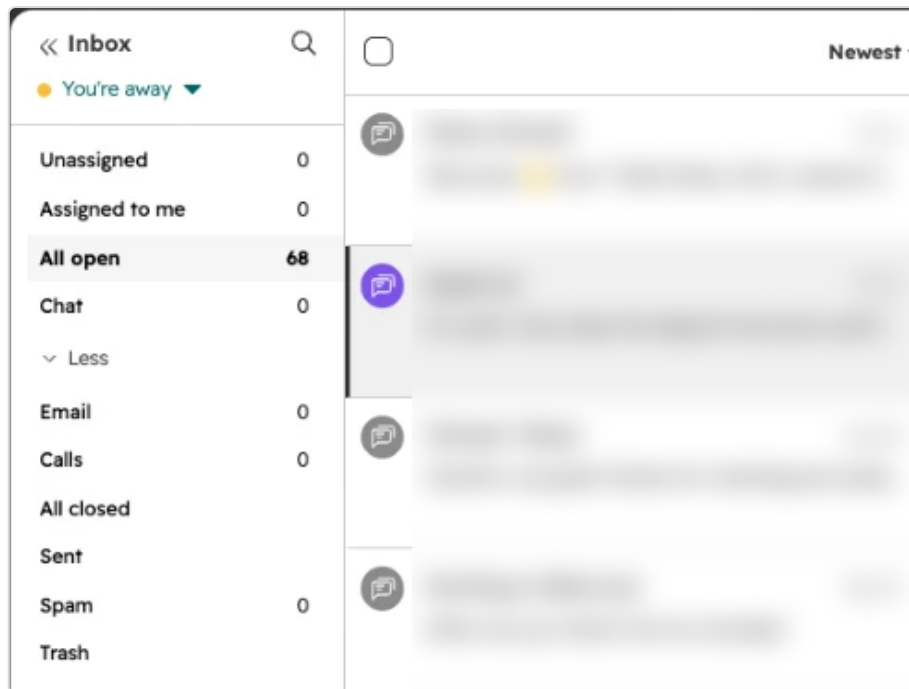
CRM → Inbox



Click CRM in the left navigation, then choose Inbox.

03 Find your assigned conversations

1. In the Inbox's left panel, select **Assigned to me**.
2. Find the contact named in your notification.
3. Click the conversation to open it.



Assigned to me sits near the top of the Inbox panel. Your conversations appear in the list beside it.

 **Assigned to me** Start here to find conversations assigned to you.

All open Use this to help locate an open conversation if you have access.

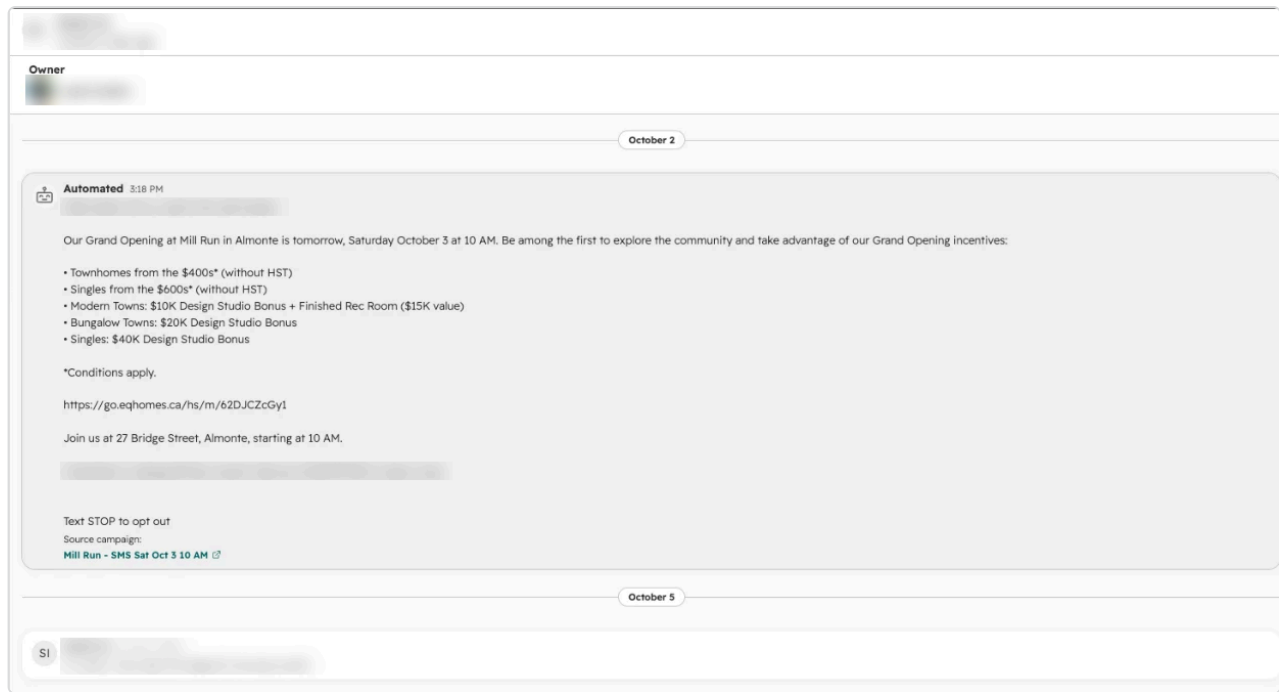
All closed Check here if the conversation may already have been closed.

Unassigned Conversations without an assigned owner. Flag these to your manager or CRM administrator when relevant.

 If your Inbox opens in **All open**, select **Assigned to me** before looking for your contact.

04 Read the message and check the owner

1. Confirm that you have opened the **correct contact**.
2. Read the latest incoming message and the earlier conversation.
3. Review the **Owner** shown at the top.
4. Check whether another teammate has already responded.



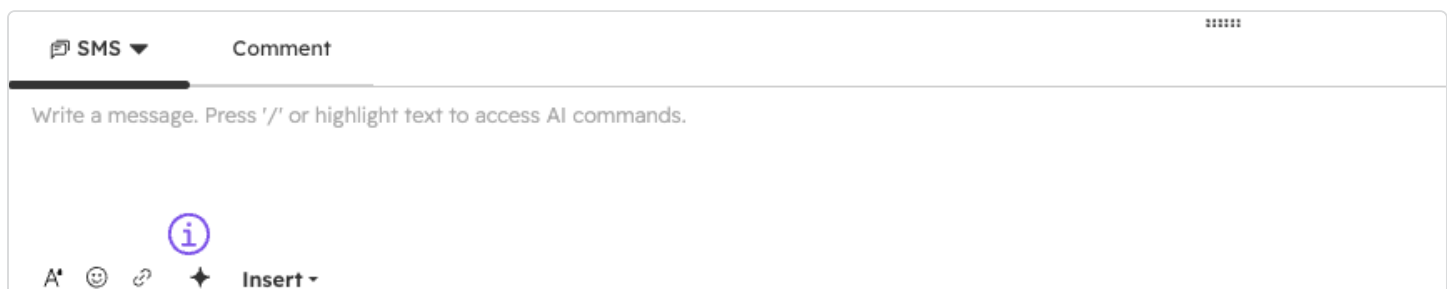
The Owner appears at the top. Earlier messages and the latest reply appear below, along with any reassignment notes.

 Some replies may be reactions, such as a thumbs-up, rather than a new question. Read the conversation before deciding what response is needed.

 If the owner appears incorrect, ask your manager or CRM administrator to review the assignment.

05 Send your SMS response

1. Go to the message composer at the bottom of the conversation.
2. Select **SMS**.
3. Type your response.
4. Check the recipient, wording, and any details you are sharing.
5. Use the **Send** control.
6. Confirm your message appears in the conversation and check for any error.



At the bottom of the conversation, keep the SMS tab selected (underlined), click into Write a message, and type your reply. Comment is for internal notes only.

 **SMS sends a text to the contact.** Comment adds an internal note and does not send an SMS.

EXAMPLE RESPONSE

“Hi Alex, thanks for getting back to me! I’d be happy to help. Which community or home style are you interested in? Sarah, eQ Homes”

Alex and Sarah are example names.

06 Record the next step

After responding:

- **Create a follow-up task** if you owe the contact information or need to follow up later.
- Update relevant contact details when the conversation provides new information.
- **Leave the conversation open** when action is still needed.
- **Close the conversation** once the exchange is complete and no immediate action remains.



Make it a daily habit

Check **Assigned to me** at the start of your workday, periodically during the day, and before signing off. Email notifications are helpful, but check the inbox directly, too.

WHEN SOMETHING ISN'T QUITE RIGHT

Troubleshooting

I received an email but cannot find the message.



Confirm you are in the eQ Homes account and the appropriate inbox, if more than one is available. Refresh, check Assigned to me, then use inbox search or review All open and All closed where permitted.

Assigned to me shows zero.

This means this view currently contains no matching conversations. If you received an alert, confirm the eQ Homes account and appropriate inbox, refresh, and check inbox search, All open and All closed where permitted.

The conversation is assigned to someone else.

Ask your manager or CRM administrator to review the contact owner and conversation assignment before taking over.

I cannot see Inbox or the SMS option.

Ask your CRM administrator to check your access and the SMS channel.

My message did not send.

Review the displayed error and contact your CRM administrator if needed. Do not assume the message was delivered.

The contact asks us to stop texting.

Stop promotional follow-up and notify your manager or CRM administrator so the contact's SMS subscription status can be checked.

⌘ How assignment works

Our HubSpot workflow, "SMS Replies | Assign to Contact Owner | V2," routes incoming SMS conversations to the contact's owner and sends that salesperson an internal email notification.

You don't need to edit or access workflows to reply to a contact.

Before you move on

0 of 5 checked

☐ Correct contact opened

☐ Latest message reviewed

- ☐ SMS selected
 - ☐ Response sent and checked
 - ☐ Follow-up recorded if needed
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